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## ABSTRACT

The general purpose of the occupational analysis is to provide workable, basic information dealing with the many and varied duties performed in the information receptionist occupation. The document opens with a brief introduction followed by a job description. The bulk of the document is presented in table form. Ten duties are broken down into a number of tasks and for each task a two-page table is presented, showing on the first page: tools, equipment, materials, objects acted upon; performance knowledge (related also to decisions, cues and errors); safety--hazard; and on the second page: science; math--number systems; and communications (performance modes, examples, and skills and concepts). The duties include: handling visitors; performing telephone duties; disseminate information; typing various items; processing mail; accounting for petty cash; making reservations; being a hostess; reproducing materials on photocopy equipment; and machine transcribing. A list of standard office and typing supplies is appended. (BP)

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Occupational Analysis

CE 004176

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# INFORMATION RECEPTIONIST

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Instructional Materials Laboratory  
Grade and Industrial Education  
The Ohio State University

5217

# AN ANALYSIS OF THE INFORMATION RECEPTIONIST OCCUPATION

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## FOREWORD

The occupational analysis project was conducted by The Instructional Materials Laboratory, Trade and Industrial Education, The Ohio State University in conjunction with the State Department of Education, Division of Vocational Education pursuant to a grant from the U.S. Office of Education.

The Occupational Analysis project was proposed and conducted to train vocational educators in the techniques of making a comprehensive occupational analysis. Instructors were selected from Agriculture, Business, Distributive, Home Economics, and Trade and Industrial Education to gain experience in developing analysis documents for sixty-one different occupations. Representatives from Business, Industry, Medicine, and Education were involved with the vocational instructors in conducting the analysis process.

The project was conducted in three phases. Phase one involved the planning and development of the project strategies. The analysis process was based on sound principles of learning and behavior. Phase two was the identification, selection and orientation of all participants. The training and workshop sessions constituted the third phase. Two-week workshops were held during which teams of vocational instructors conducted an analysis of the occupations in which they had employment experience. The instructors were assisted by both occupational consultants and subject matter specialists.

The project resulted in producing one hundred two trained vocational instructors capable of conducting and assisting in a comprehensive analysis of various occupations. Occupational analysis data were generated for sixty-one occupations. The analysis included a statement of the various tasks performed in each occupation. For each task the following items were identified: tools and equipment; procedural knowledge; safety knowledge; concepts and skills of mathematics, science and communication needed for successful performance in the occupation. The analysis data provided a basis for generating instructional materials, course outlines, student performance objectives, criterion measures, as well as identifying specific supporting skills and knowledge in the academic subject areas.

## PREFACE

The following is an analysis of an information receptionist. It must be pointed out that the tasks and duties listed are performed by the majority of information receptionists. Some information receptionists will perform all of these duties while others may perform only one of the duties depending on the size and policy of the company. The tasks are listed in chronological order.

This position can be an entry level position which can be filled by someone who has completed a general business program. A cheerful personality is as important to the success of this position as the technical skills, since he/she is the first company representative the public meets. It is not intended that this be the basis for a complete program.

## **ACKNOWLEDGMENT**

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## JOB DESCRIPTION

An information receptionist is the first company representative who greets visitors in the office face-to-face. The duties of the information receptionist vary according to organizational structure. Such duties include greeting callers, answering questions about the company, sorting and distributing incoming and outgoing mail, handling the switchboards, keeping the petty cash, being a hostess or tour guide, taking care of various reservations, reproducing materials, maintaining the reception area, running errands, transcribing, filling in temporarily at other work stations, typing assorted materials, and carrying out any oral or written instructions of the employer.

Duty A

**Handling Visitors**

- 1 Greet, identify, and screen visitor
- 2 Make visitors feel comfortable
- 3 Announce visitor to employee
- 4 Maintain visitor book and issue visitor passes
- 5 Direct visitor to proper office or department
- 6 Answer visitor's questions
- 7 Keep calendar of appointments

**(TASK STATEMENT)** GREET, IDENTIFY AND SCREEN VISITORS

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON   | PERFORMANCE KNOWLEDGE  | SAFETY – HAZARD   |  |  |
|--|--|---|--|--|
| Standard office set-up<br>Calendar of appointments   | <ul style="list-style-type: none"> <li>Find out visitor's name and purpose of visit</li> <li>Make visitor feel at ease</li> <li>Determine who visitor wishes to see</li> </ul>   | <p><b>CUES</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <b>DECISIONS</b> <ul style="list-style-type: none"> <li>Recognize aggressive visitor</li> <li>Recognize if employee wishes to see visitor</li> </ul> </td><td style="width: 50%; vertical-align: top;"> <b>ERRORS</b> <ul style="list-style-type: none"> <li>Improper handling of visitor</li> </ul> </td></tr> </table> | <b>DECISIONS</b> <ul style="list-style-type: none"> <li>Recognize aggressive visitor</li> <li>Recognize if employee wishes to see visitor</li> </ul> | <b>ERRORS</b> <ul style="list-style-type: none"> <li>Improper handling of visitor</li> </ul> |
| <b>DECISIONS</b> <ul style="list-style-type: none"> <li>Recognize aggressive visitor</li> <li>Recognize if employee wishes to see visitor</li> </ul> | <b>ERRORS</b> <ul style="list-style-type: none"> <li>Improper handling of visitor</li> </ul>   |   |  |  |
|  | <p><b>SCIENCE</b></p> <ul style="list-style-type: none"> <li>Basic need of feeling important [Ego]</li> <li>Respect for visitor [Self-respect of visitor]</li> <li>Use tactful reasons if visit cannot be completed [Insecurity]</li> <li>Show fairness - ethics</li> <li>Avoid offending visitor</li> <li>Avoid being trapped in a coverup</li> </ul> | <p><b>MATH – NUMBER SYSTEMS</b></p> <ul style="list-style-type: none"> <li>Follow oral and written instructions</li> <li>Give verbal instructions</li> <li>Demonstrate self-confidence</li> <li>Question and listen</li> </ul>  |  |  |
|  |  | 12  |  |  |

| (TASK STATEMENT) MAKE VISITORS FEEL COMFORTABLE  |  | SAFETY – HAZARD   |  |
|--|--|---|--|
| TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON  |  | PERFORMANCE KNOWLEDGE   |  |
| Standard office set-up<br>Coffee machine and supplies<br>Reading material<br>Smoking material<br>CD/DVD rack<br>Waiting area — chairs, tables, sofas | <ul style="list-style-type: none"> <li>Check room environment</li> <li>Talk with visitor</li> <li>Hang up coat and hat</li> <li>Provide reading materials, ash tray</li> <li>Serve coffee</li> <li>Continue with work in progress</li> </ul> | <ul style="list-style-type: none"> <li>Avoid burning self or visitor with coffee</li> <li>Be sure smoking materials are extinguished</li> </ul> |  |
|  | <p><b>DECISIONS</b></p> <p>Implied - application of procedure</p>  | <p><b>CUES</b></p>  | <p><b>ERRORS</b></p> <p>Visitor feels uncomfortable</p>  |
|  |  |   |  |
| SCIENCE  |  | COMMUNICATIONS  |  |
|  |  | <p><b>MATH — NUMBER SYSTEMS</b></p> <p>Ratio and proportion</p> <p>Multiplication</p> <p>[Making coffee]</p>                                    | <p>Inquire about comfort of visitor</p> <p>Gestures of concern and respect</p> <p>Error with visitor</p> |
|  |  |   |  |
| (Task Statement) REASSURE VISITOR OF HIS/HER APPOINTMENT   |  | COMPUTER  |  |
|  |  |   |  |

## (TASK STATEMENT) ANNOUNCE VISITOR TO COMPANY EMPLOYEE

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE   | SAFETY & HAZARD   |
|---|---|---|
| Standard office set-up<br>Company director<br>Visitor's name<br>Intercom - P.A. - telephone | Locate employee<br>Relate nature of visitor's business<br>Reassure visitor of appointment |   |
| DECISIONS   | CUES  | ERRORS  |
| Implied - application of procedure  |   | Visitor waits too long<br>Announcing wrong person<br>Announcing visitor to wrong person<br>Letting visitor overhear employee's remarks  |
| SCIENCE   | MATH - NUMBER SYSTEMS   | COMMUNICATIONS  |
| Ego - make visitor feel important   | Use of locator bell systems   | Reading appointment book<br>Reading company directory<br>Speaking - Proper pronunciation of visitor's name<br>Interpreting messages from employee concerning visitor<br>Speaking - Keep emotion out of voice while on phone |

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**(TASK STATEMENT) MAINTAIN VISITOR BOOK AND ISSUE GUEST PASSES**

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON   | PERFORMANCE KNOWLEDGE   |   |   |
|--|---|---|---|
|  | SAFETY - HAZARD   | CUES  | ERRORS  |
| Standard office set-up<br>Guest book<br>Visitor passes<br>Safety equipment<br>Safety rules | Date guest book<br>Sign visitors in and get addresses<br>Issue visitor pass<br>Issue safety equipment and rules<br>Account for visitor passes | Implied - application of procedure  | Passes issued incorrectly<br>Visitor book incomplete<br>Failure to wear safety equipment<br>[Visitor] |
|  |   |   |   |
|  |   |   |   |
| SCIENCE  | MATH - NUMBER SYSTEMS   | COMMUNICATIONS  |   |
| Courtesy<br>Importance of activities involved to visitor 1[Motivation]                     | Locate by approximation rational numbers and integers on<br>the number line (Sequential ordering)   | Speaking - courteous treatment of visitors to get their names<br>and addresses<br><br>Writing - guest passes<br><br>Speaking - impress need of safety equipment upon<br>visitor<br><br>Facial expressions |   |

**(TASK STATEMENT) DIRECT VISITOR TO PROPER OFFICE OR DEPARTMENT**

| <b>TOOLS, EQUIPMENT, MATERIALS,<br/>OBJECTS ACTED UPON</b>   | <b>PERFORMANCE KNOWLEDGE</b>  | <b>SAFETY – HAZARD</b>  |
|--|---|---|
| Standard office set-up<br>Floor plan map<br>Office directory | <ul style="list-style-type: none"> <li>Be familiar with office layout</li> <li>Determine employee location</li> <li>Inform visitor of direct route to employee</li> <li>Review safety procedures</li> <li>Guide visitor to office location</li> <li>Make formal introduction</li> </ul> | <b>DECISIONS</b><br><ul style="list-style-type: none"> <li>Implied - application of procedure</li> </ul> <b>CUES</b><br><b>ERRORS</b><br><ul style="list-style-type: none"> <li>Failure to follow safety precautions</li> <li>Failure to avoid restricted area</li> <li>Directing visitor to wrong place</li> <li>Visitor getting lost</li> </ul> |
|  |   | <b>COMMUNICATIONS</b><br><ul style="list-style-type: none"> <li>Reading company directory</li> <li>Interpreting map</li> <li>Speaking directions to area</li> <li>Poise in directing visitor</li> <li>Etiquette - making introductions</li> </ul>   |
|  | <b>MATH – NUMBER SYSTEMS</b><br><ul style="list-style-type: none"> <li>Avoid insecurity by using common vocabulary</li> <li>Assume ability of visitor to follow directions. Do not talk down to him/her [Self-worth]</li> </ul>   | <b>SCIENCE</b><br><ul style="list-style-type: none"> <li>16</li> </ul>  |

**(TASK STATEMENT) / ANSWER VISITOR'S QUESTIONS**

| SAFETY - HAZARD  | PERFORMANCE KNOWLEDGE   | DECISIONS   | CUES  | ERRORS   |
|--|---|---|---|--|
| <b>TOOLS, EQUIPMENT, MATERIALS,<br/>OBJECTS ACTED UPON</b> | <b>PERFORMANCE KNOWLEDGE</b><br><br>Answer questions which are general<br>Locate information from appropriate source<br>Refer to company reference<br><br><b>DECISIONS</b><br><br>Determine which questions may be answered<br>Decide which reference source to use | <b>CUES</b><br><br>Company policy<br>Where information is located | <b>ANSWERING RESTRICTED QUESTIONS</b><br><br>Providing wrong information<br>Creating a poor company image | <b>COMMUNICATIONS</b><br><br>Clarify visitor's questions - interpretation<br>Understand reference material<br>Give verbal answers to questions<br>Convey self-confidence by posture, tone of voice, or gestures<br>Eye contact to acknowledge person, show him/her attention |
| <b>SCIENCE</b>   | <b>MATH - NUMBER SYSTEMS</b><br><br>Confirm validity of question [Reinforcement]<br>Trick in avoiding questions [Eqo]   |   |   | <b>17</b>  |

| TASK STATEMENT) KEEP CALENDAR OF APPOINTMENTS      |  | SAFETY - HAZARD   |  |
|--|--|---|--|
| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON |  | PERFORMANCE KNOWLEDGE   |  |
| Standard office set-up<br>Calendar of appointments | Record appointments as they are scheduled<br>Remind employee of appointments<br>Cancel appointments<br>Reschedule appointments   | DECISIONS<br><br>Determine amount of time needed for appointment.<br>Determine time to schedule appointments<br>Determine who to schedule for appointment.      | CUES<br><br>Purpose of appointment<br>Recognize available time<br>Who may be seen  |
|  |  | ERRORS<br><br>Avoid scheduling two appointments at once<br>Scheduling appointments too close<br>Failure to notify all persons who are to attend the appointment |  |
|  | MATH - NUMBER SYSTEMS  | COMMUNICATIONS  | Read and interpret appointment book<br>Analyze time needed for each appointment<br>Get instructions from employee<br>Write reminder notes<br>Facial expressions of concern |
| SCIENCE  | Dates<br>Time  |   |  |
|  | Use tact in denying appointments [Avoid frustration]<br>General courtesy [Respect]<br>Offer realistic alternatives to broken appointments [Building trust of company]<br>Console late visitors and offer to reschedule [Reinforcement of visitor's self-worth] |   |  |

Duty B

Performing Telephone Duties

- 1 Answer incoming calls
- 2 Maintain telephone directories
- 3 Place long distance calls and keep log
- 4 Verify telephone bill

| (TASK STATEMENT) ANSWER INCOMING CALLS | TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD   |
|--|--|---|---|
|  | Standard office set-up<br>Company phone directory<br>Local phone books<br>Out-of-town phone books<br>Personal telephone files<br>Message pad | <p>Answer phone<br/>Screen unwanted calls<br/>Direct calls to correct person<br/>Take phone messages and relay them<br/>Transfer calls<br/>Keep callers on "hold" informed<br/>Soothe irate callers</p> <p><b>DECISIONS</b></p> <p>Determine to whom to direct the call<br/>Determine if call should be put through</p> | <p><b>ERRORS</b></p> <p>Routing call to wrong person<br/>Not getting names correctly<br/>Transposing phone numbers<br/>Failing to relay messages<br/>Cutting callers off</p>                      |
|  |  | <p><b>CUES</b></p> <p>Purpose of call<br/>Employee instructions</p>   | <b>COMMUNICATIONS</b>   |
|  |  |   | <p>Speaking - pleasant phone voice that generates warmth<br/>Writing - legibly and accurately write messages<br/>Reading and using company directory</p>  |
|  |  | <b>MATH - NUMBER SYSTEMS</b>  |   |
|  |  | <b>SCIENCE</b>  | <p>Company extension system<br/>Understanding telephone electronics</p> <p>Make caller feel important [Ego]<br/>Be a good listener [Concern]<br/>Tactfully handle irate callers [Frustration]</p> |

**(TASK STATEMENT) MAINTAIN TELEPHONE DIRECTORIES**

| <b>TOOLS, EQUIPMENT, MATERIALS,<br/>OBJECTS ACTED UPON</b>  | <b>PERFORMANCE-KNOWLEDGE</b>   |   |  |
|---|--|---|--|
|   | <b>SAFETY - HAZARD</b>   |   |  |
| Standard office set-up<br>Local office directory<br>Company directory<br>Local telephone books<br>Out-of-town telephone books as needed<br>Emergency numbers<br>Frequently called numbers | <ul style="list-style-type: none"> <li>Keep current telephone books available</li> <li>Be familiar with alphabetic system</li> <li>Keep frequently called number list accessible</li> <li>Make company lists of extensions available</li> <li>Prepare updated telephone lists</li> <li>Maintain personal phone number lists</li> </ul> | <ul style="list-style-type: none"> <li>Transposing numbers</li> <li>Losing numbers</li> <li>Illegible writing of numbers</li> </ul> | <b>ERRORS</b>  |
|   | <p><b>DECISIONS</b></p> <p>Determine what numbers are out of date</p>  | <p><b>CUES</b></p> <p>New numbers issued</p>  | <b>COMMUNICATIONS</b>  |
|   |  |   | <ul style="list-style-type: none"> <li>Reading telephone directory</li> <li>Writing telephone lists</li> <li>Speaking - confirmation of numbers</li> </ul> |
|   | <p><b>MATH - NUMBER SYSTEMS</b></p>  |   |  |
|   |  | <ul style="list-style-type: none"> <li>Writing arabic figures correctly</li> <li>Awareness of area code system</li> </ul>           |  |
|   | <p><b>SCIENCE</b></p>  |   |  |

| (TASK STATEMENT)  | PLACE LONG DISTANCE CALLS   | SAFETY - HAZARD  |
|---|---|--|
| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON            | PERFORMANCE KNOWLEDGE   |  |
| Standard office set-up<br>Telephone log<br>Telephone listings | <p>Locates telephone number<br/>Place calls<br/>Write calls in log - number called and caller<br/>Arrange conference calls<br/>Make overseas calls<br/>Transfer calls<br/>Place telegrams</p> <p><b>DECISIONS</b></p> <p>Determine type of call to make<br/>Determine when to make the call</p> | <p><b>ERRORS</b></p> <p>Charging wrong person with call<br/>Placing wrong type<br/>Cutting off people<br/>Forgetting about time zone<br/>Dialing wrong number</p>  |
|   | <p><b>CUES</b></p> <p>Cost<br/>Time zone<br/>Company policy<br/>Employee instructions</p>   | <b>COMMUNICATIONS</b>  |
|   | <b>MATH - NUMBER SYSTEMS</b>  | <p>Using directories<br/>Legible and accurate writing<br/>Using proper telephone techniques<br/>Projecting a telephone personality</p>   |
|   | <b>SCIENCE</b>  | <p>Long distance rates<br/>Utilizing telephone number system<br/>Understand telephone electronic system<br/>Understanding time zones</p> <p>Frustration of worker in trying to place calls within time limits<br/>General courtesy</p> |

| (TASK STATEMENT)  | VERIFY TELEPHONE BILL   | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD |
|---|---|---|-----------------|
| TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON   | <ul style="list-style-type: none"> <li>Standard office set-up</li> <li>Telephone bill</li> <li>Long distance log</li> </ul>   | <ul style="list-style-type: none"> <li>Check long distance log against phone bill</li> <li>Itemize long distance expenses by department</li> <li>Confirm total</li> <li>Authorize bill for payment</li> <li>File long distance information</li> </ul> |                 |
| DECISIONS   | CUES  | ERRORS  |                 |
| Determine if bill is correct  | Are calls accounted for<br>%  | Failure to keep accurate records of calls made<br>Poor math skills causing inaccuracy   |                 |
| SCIENCE   | MATH - NUMBER SYSTEMS   | COMMUNICATIONS  |                 |
| <ul style="list-style-type: none"> <li>Frustration of worker trying to locate unlogged calls</li> <li>Persistence needed to track down calls</li> </ul> | <ul style="list-style-type: none"> <li>Addition and subtraction of whole numbers</li> <li>Addition and subtraction of decimal fractions</li> <li>Percentages</li> <li>Multiplication of decimals</li> </ul> | <ul style="list-style-type: none"> <li>Comparing telephone bill with log</li> <li>Coding system for bill check off</li> <li>Recording calls in log</li> </ul>   |                 |

Duty C

**Disseminate Information**

**1 Disseminate information**

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**(TASK STATEMENT) - DISSEMINATE INFORMATION**

| <b>TOOLS, EQUIPMENT, MATERIALS,<br/>OBJECTS ACTED UPON</b>  | <b>PERFORMANCE KNOWLEDGE</b>  | <b>SAFETY - HAZARD</b>  |
|---|---|---|
| Standard office set-up<br>Company manual<br>Company directory<br>House organ<br>Company map<br>Company brochures<br>Stockholder reports<br>General reference materials  | <p>Answer questions<br/>Pass out materials<br/>Replenish brochure supply<br/>Generate goodwill<br/>Keep listing of current company activities</p> <p><b>DECISIONS</b></p> <p>Determine if question should be answered<br/>Determine manner in which questions should be answered</p> <p><b>CUES</b></p> <p>Confidentiality of a material<br/>To whom information is being given<br/>Immediacy of information<br/>Type of information needed</p> | <p>Giving out confidential information<br/>Giving out incorrect information<br/>Being slow in sending information</p>   |
| <b>SCIENCE</b>  | <b>MATH — NUMBER SYSTEMS</b>  | <b>COMMUNICATIONS</b>   |
| Tactfully deny information [Protect ego]<br>Acknowledge importance of a question [Reinforcement]<br>Reinforce visitor's importance by being attentive<br>Correct false information when necessary<br>Protect company interests [Ethics]<br>Demonstrate professional attitudes |   | <p>Oral - answering questions<br/>Facial expression - attentiveness to visitor<br/>Physical gestures to command attention or direction<br/>Pleasant tone of voice<br/>Select materials to be used</p> |

Duty D      Typing Various Items

- 1    Arrange correspondence
- 2    Prepare forms
- 3    Prepare duplicating materials
- 4    Maintain typewriter

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## (TASK STATEMENT) ARRANGE CORRESPONDENCE

TOOLS, EQUIPMENT, MATERIALS  
OBJECTS ACTED UPON

Standard office set-up  
Standard typing supplies

## PERFORMANCE KNOWLEDGE

- Select letter styles and uses
- Type letters and cartoons
- Proofread
- Make neat corrections
- Use correct paper form
- Address envelopes
- Attach enclosures
- Prepare address finder cards
- Read and answer correspondence

- DECISIONS**
- Determine type of correspondence necessary
  - Determine what is to be said in the correspondence

## SAFETY - HAZARD

## ERRORS

- Incorrect information
- Undetected errors

## SCIENCE

- Reply prompt [Attention]  
Motivate action with correspondence  
Use appropriate vocabulary [Self image of people]

## MATH - NUMBER SYSTEMS

- Addition and subtraction of whole numbers  
Multiplication and division with whole numbers

## COMMUNICATIONS

- Read correspondence  
Write letters, using correct:  
Grammatical structure and logic  
Vocabulary and spelling  
Criticize work for errors and tone

| (TASK STATEMENT) PREPARE FORMS | TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON   | PERFORMANCE KNOWLEDGE  | SAFETY - HAZARD   |
|--------------------------------|---|--|---|
|                                | Standard office set-up<br>Standard typing supplies<br>Invoices<br>Purchase orders<br>Requisitions | Use appropriate form<br>Type forms correctly<br>Verify information<br>Make corrections<br>Address envelopes<br>Expedite form<br>File office copy   |   |
|                                |   | DECISIONS  | CUES  |
|                                |   | Choose correct form  | Purpose of information<br>Type of information<br>To whom information is being sent            |
|                                |   |  | Undetected errors<br>Misfiled<br>Wrong information<br>Use of wrong form                       |
|                                | SCIENCE   | MATH - NUMBER SYSTEMS  | COMMUNICATIONS  |
|                                |   | Reading and interpreting charts, tables, and/or graphs<br>Locate by approximation rational numbers and integers on the number line (Sequential ordering)<br>Code numbering system—<br>Addition, subtraction, multiplication, division<br>Use of decimals | Deciphering instructions<br>Choosing correct form<br>Following directions<br>Using dictionary |

## (TASK STATEMENT) PREPARE DUPLICATING MATERIAL

TOOLS, EQUIPMENT, MATERIALS,  
OBJECTS ACTED UPON

| PERFORMANCE KNOWLEDGE  | SAFETY - HAZARD  |   |
|--|--|---|
|  | CUES   | ERRORS  |
| Type ditto<br>Correct ditto<br>Type stencil<br>Correct stencil<br>Type offset master or original<br>Correct offset masters<br>Prepare typewriter for typing<br>Razor blades<br>Offset erasers<br>Non-producing pencils | Type ditto<br>Correct ditto<br>Type stencil<br>Correct stencil<br>Type offset master or original<br>Correct offset masters<br>Prepare typewriter for typing<br>Razor blades<br>Offset erasers<br>Non-producing pencils | Razor blade cuts<br><br>Sloppy work<br>Inefficient use of equipment<br>Undetected errors<br>Typing ditto master backwards |
| Determine which technique is best  | Purpose and type of material<br>Quantity needed<br>Time available for completion<br>Employee instructions<br>Cost  |   |

| MATH - NUMBER SYSTEMS | COMMUNICATIONS  |
|-----------------------|---|
| Measures of length    | Receive written and oral instructions<br>Type information |

## (TASK STATEMENT) MAINTAIN TYPEWRITER

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON   | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD  |
|--|---|--|
| Standard office set-up<br>Standard typing supplies<br>Brushes<br>Cleaning fluid<br>Rags<br>Typewriter ribbons<br>Typewriter manual | <p>Be familiar with operation of parts<br/>Change ribbon<br/>Clean type bars<br/>Call repair mechanic when needed<br/>Dust typewriter</p> | <p>Electrical short in machine<br/>Worn, frayed plugs or cords<br/>Tripping over cords</p> |
| DECISIONS  | CUES  | ERRORS   |
| Determine when to change ribbon<br>Determine when to clean machine<br>Determine when to call repair mechanic                       | <p>Poor type - type of job<br/>Poor operation<br/>Broken</p>  |  |
| MATH - NUMBER SYSTEMS  | SCIENCE   | COMMUNICATIONS   |
|  |   | <p>Speaking - calls to repair mechanic<br/>Reading manual directions</p>                   |

Duty E

**Processing Mail**

- 1 Process incoming mail
- 2 Process outgoing mail

## (TASK STATEMENT) PROCESS INCOMING MAIL

TOOLS, EQUIPMENT, MATERIALS,  
OBJECTS ACTED UPON

Standard office setup  
 Scissors  
 Letter opener  
 Routing slips

## PERFORMANCE KNOWLEDGE

- Sorts mail
- Routes mail
- Pays overdue postage
- Sign for special mail
- Deliver mail
- Forward and/or return mail

## SAFETY - HAZARD

| DECISIONS                   | CUES   | ERRORS   |
|-----------------------------|--|--|
| Determine who receives mail | Address<br>Title of employee<br>Department head<br>Purpose of correspondence<br>Return addresses | Sending mail to wrong person<br>Losing mail<br>Opening personal or confidential mail |

## SCIENCE

## MATH - NUMBER SYSTEMS

## COMMUNICATIONS

Read mail addresses

| (TASK STATEMENT) PROCESS OUTGOING MAIL | TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE  | SAFETY - HAZARD   |
|--|---|--|---|
|  | Standard office set-up<br>Scissors<br>Postage meter<br>Zip code directory<br>Postage log<br>Mailing materials<br>Cord<br>Masking tape<br>Mailing labels | Wrap and address packages<br>Put on special mailing notation<br>Locate zip codes.<br>Calculate postage<br>Operate postage meter<br>Keep postage log<br>Bundle-mail<br>Take mail to mailing point<br>Maintain company mailing list<br><b>DECISIONS</b><br>Determine what class of mail to use | <b>ERRORS</b><br>Improperly setting postage meter for date and amount   |
|  |   | <b>CUES</b><br>Employee instructions<br>Company policy<br>U.S. mail policy<br>Cost<br>Package size and content   |   |
|  |   | <b>MATH — NUMBER SYSTEMS</b><br>Addition and subtraction of whole numbers<br>Measures of length<br>Measures of weight  | <b>COMMUNICATIONS</b><br>Writing mailing addresses<br>Reading postal regulations and rate charges<br>Maintaining company mailing list<br>Typing addresses |
|  |   | <b>SCIENCE</b>   | 23  |

Duty F

Accounting for Petty Cash

1 Accounting for petty cash

## (TASK STATEMENT) ACCOUNTING FOR PETTY CASH

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD  |
|---|---|--|
|   | DECISIONS   | CUES   |
| Standard office set-up<br>Petty cash box<br>Cash<br>Petty cash ledger<br>Petty cash voucher | Pays incidental expenses<br>Records and itemizes cash disbursements<br>Prepares replacement voucher<br>Replenish fund | <b>ERRORS</b><br>Inefficient handling of funds<br>Money being stolen<br>Money being mislaid<br>Not itemizing expense at time of disbursement |
|   | Determine if expense should be incurred   | Legitimate expense<br>Company policy<br>Employee instructions  |
|   | <b>SCIENCE</b>  | <b>MATH - NUMBER SYSTEMS</b><br>Addition and subtraction of whole numbers<br>Multiplication and division with whole numbers                  |
|   | <b>COMMUNICATIONS</b>   | Writing legible figures in records<br>Listening to person requesting payment<br>Speaking - communications                                    |

Duty G

Making Reservations

- 1 Keep up to date schedule books
- 2 Make and confirm travel reservations
- 3 Make and confirm rental car arrangements
- 4 Make and confirm hotel reservations
- 5 Make and plan luncheons
- 6 Arrange private transportation

(TASK STATEMENT) KEEP UP-TO-DATE SCHEDULE BOOKS

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE  | SAFETY - HAZARD   |
|---|--|---|
| Standard office set-up<br>Current schedule books from airlines, buses, trains, etc.<br>Book of 'hotels'<br>Telephone list of rental car agencies<br>Telephone list of 800 numbers for major motel chains<br>Road maps | Obtain up-to-date schedule books<br>Make changes in schedule books<br>Destroy outdated material<br>Collect and file current issues of roadmaps | Using wrong material to plan itinerary  |
| DECISIONS   | CUES   | ERRORS  |
| Determine which materials are out-of-date   | New material replacements<br>Employee instructions   | Speaking request information<br>Writing for new materials<br>Reading road maps and schedule books |
| SCIENCE   | MATH - NUMBER SYSTEMS  | COMMUNICATIONS  |

## (TASK STATEMENT) MAKE AND CONFIRM TRAVEL RESERVATIONS

TOOLS, EQUIPMENT, MATERIALS,  
OBJECTS ACTED UPON

Standard office set-up  
 Reservation numbers  
 Current schedule books  
 Airline tickets  
 Airline travel card numbers

## PERFORMANCE KNOWLEDGE

- Plan itinerary, places, dates and times
- Schedule flights, etc., to fit itinerary
- Confirm reservations before departure
- Get special travel regulations for mode of travel
- Prepare list of alternate flights, etc.

## SAFETY - HAZARD

- ERRORS**
- Issuing ticket for wrong date
  - Forgetting to confirm reservations
  - Forgetting to cancel reservations
  - Forgetting about time zones

## DECISIONS

- Determine if flight, etc. fits desired itinerary
- Times desired
- Mode of travel desired

## CUES

## COMMUNICATIONS

- Speaking - telephone use for reservations
- Typing itinerary
- Reading travel schedules
- Writing tickets

## SCIENCE

- Consideration of convenience and comfort [Pride]

## MATH - NUMBER SYSTEMS

- Understanding time zones
- Reading time tables

(TASK STATEMENT) MAKE AND CONFIRM RENTAL CAR RESERVATIONS

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE  | SAFETY - HAZARD                         |
|---|--|---|
| Standard office setup<br>List of rental car agencies<br>Travel card numbers<br>Travel itinerary | Reserve car and arrange delivery<br>Note car reservation on itinerary. |   |
| DECISIONS   | CUES   | ERRORS                                  |
| Determine if car will be available  | Employee instructions<br>Rental information                            | Late arrival of car<br>No car available |
| SCIENCE   | MATH - NUMBER SYSTEMS  | COMMUNICATIONS                          |
|   |  | Speaking - telephone reservations       |

(TASK STATEMENT) MAKE AND CONFIRM HOTEL RESERVATIONS

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD   |      |        |   |  |                            |  |
|---|---|---|------|--------|---|--|----------------------------|--|
| Standard office set-up<br>Itinerary<br>List of accommodations                                       | <ul style="list-style-type: none"> <li>Plan itinerary</li> <li>Make hotel reservation to fit plan</li> <li>List hotel reservation on itinerary</li> <li>Guarantee reservations when necessary</li> </ul>  |   |      |        |   |  |                            |  |
|   | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>DECISIONS</th><th>CUES</th><th>ERRORS</th></tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> <li>Choice of hotel</li> <li>Choice of accommodations</li> </ul> </td><td> <ul style="list-style-type: none"> <li>Employee preference</li> <li>Employee instructions</li> <li>Cost</li> <li>Availability</li> <li>Location of appointment or meeting</li> </ul> </td><td>No guaranteed reservations</td></tr> </tbody> </table> | DECISIONS   | CUES | ERRORS | <ul style="list-style-type: none"> <li>Choice of hotel</li> <li>Choice of accommodations</li> </ul> | <ul style="list-style-type: none"> <li>Employee preference</li> <li>Employee instructions</li> <li>Cost</li> <li>Availability</li> <li>Location of appointment or meeting</li> </ul> | No guaranteed reservations |  |
| DECISIONS   | CUES  | ERRORS  |      |        |   |  |                            |  |
| <ul style="list-style-type: none"> <li>Choice of hotel</li> <li>Choice of accommodations</li> </ul> | <ul style="list-style-type: none"> <li>Employee preference</li> <li>Employee instructions</li> <li>Cost</li> <li>Availability</li> <li>Location of appointment or meeting</li> </ul>  | No guaranteed reservations  |      |        |   |  |                            |  |
|   |   | <ul style="list-style-type: none"> <li>Speaking - telephone reservation</li> <li>Writing notes on itinerary</li> <li>Reading list of possible hotels</li> </ul> |      |        |   |  |                            |  |
|   |   |   |      |        |   |  |                            |  |

| (TASK STATEMENT) MAKE AND PLAN LUNCHEONS  | TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON   | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD  |
|---|---|---|--|
| Standard office set-up<br>Catering information<br>List of possible locations<br>Guest lists | Reserve hall<br>Choose caterer<br>Plan and order menu<br>Arrange for table decorations<br>Send out invitations<br>Compile list of attending<br>Make name tags<br>Plan and engage entertainment (speakers, etc.) | <p><b>DECISIONS</b></p> <ul style="list-style-type: none"> <li>Purpose of affair</li> <li>Choosing caterer</li> </ul> <p><b>CUES</b></p> <ul style="list-style-type: none"> <li>Boss's instructions</li> <li>Cost, menu desired availability</li> </ul> | <p><b>ERRORS</b></p> <ul style="list-style-type: none"> <li>Too expensive</li> <li>Accommodations not satisfactory</li> <li>Not ordering enough food</li> <li>Poor location</li> <li>Not enough people showing up</li> </ul> |
|   |   |   |  |
|   |   |   |  |
|   |   |   |  |
| SCIENCE   | MATH - NUMBER SYSTEMS   | COMMUNICATIONS  |  |
| Motivating people to attend   | Liquids and dry measures<br>Locate by approximation rational numbers and integers on the number line (sequential ordering)  | <p>Speaking - dealing with caterer<br/>receives instructions from employer</p> <p>Writing - list of attending<br/>name tags<br/>invitations</p> <p>Reading caterer's information</p> <p>Typing contract</p>   | 44   |

**(TASK STATEMENT) ARRANGE PRIVATE TRANSPORTATION**

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE  | SAFETY - HAZARD  |
|---|--|--|
| Standard office set-up<br>Telephone numbers for private modes of transportation<br>Employee's time schedule | Make arrangements for travel mode most appropriate to destination and budget |  |
| DECISIONS   | CUES   | ERRORS   |
| Determining what is required of mode  | Cost<br>Speed necessary<br>Employee instructions                             | Inefficient travel<br>Slow<br>Costly                               |
| SCIENCE   | MATH - NUMBER SYSTEMS  | COMMUNICATIONS   |
|   |  | Speaking - phone conversations<br>Reading employee's time schedule |

Duty H

**Being a Hostess**

- 1 Maintain reception area
- 2 Serve refreshments
- 3 Conduct tours
- 4 Run errands

| TASK STATEMENT                                  | SAFETY - HAZARD  |   |   |
|---|--|---|---|
|   | PERFORMANCE KNOWLEDGE  | DECISIONS   | COMMUNICATIONS  |
| TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON | <p>Regulate temperature of reception area<br/>           Straighten up and dust reception area<br/>           Provide recent reading material<br/>           Personalize area (pictures, flowers, etc.)<br/>           Empty ashtrays during day</p> <p>Implied - application of procedure</p> | <p>CUES</p> <p>People with allergies to flowers<br/>           Smoking items that are not extinguished</p> <p>ERRORS</p> <p>Uncomfortable area<br/>           Unpleasant looking area</p> | <p>MATH - NUMBER SYSTEMS</p> <p>SCIENCE</p> <p>MAKING RECEPTION AREA COMFORTABLE</p> <p>MAKING RECEPTION AREA CLEAN</p> |
|   |  |   | 44  |

44.

| (TASK STATEMENT)                                | SERVE REFRESHMENTS   | PERFORMANCE KNOWLEDGE  |                        | SAFETY - HAZARD                        |  |
|---|--|--|------------------------|--|--|
|   |  | DECISIONS  | CUES                   | DECISIONS                              | CUES   |
| TOOLS, EQUIPMENT, MATERIALS, OBJECTS ACTED UPON | Standard office setup<br>Coffee pot and supplies<br>Accessory supplies (tea bags, sugar, etc.)<br>Paper supplies<br>Serving tray<br>Set of china cups<br>Cleaning supplies | Prepare refreshments<br>Serve refreshments<br>Clean up<br>Order supplies as needed | Burning self or caller | Determine if guest wishes refreshments | Guest's actions<br>Guest's inquiry   |
| SCIENCE   |  |  |                        |  |  |
| MATH - NUMBER SYSTEMS                           |  | Liquid and dry measures  |                        |  | Speaking with a friendly tone<br>Gestures in serving<br>Facial expressions to show concern |
| COMMUNICATIONS                                  |  |  |                        |  |  |

(TASK STATEMENT) CONDUCT TOURS

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON                     | PERFORMANCE KNOWLEDGE  | SAFETY - HAZARD   |
|--|--|---|
| DECISIONS  | CUES   | ERRORS  |
| Cont rack<br>Map<br>Company brochures<br>Giveaways (if company policy) | Greet visitors and organize group<br>Tour introduction<br>Conduct tour<br>Answer questions<br>End tour and escort visitors out | Not following safety procedures   |
|  | Determine what areas to tour   | Group instructions<br>Company policy<br>Time available  |
|  |  | Losing visitors<br>Uninteresting tour   |
| SCIENCE  | MATH - NUMBER SYSTEMS  | COMMUNICATIONS  |
|  | Make visitors feel comfortable (Comfort)<br>Project company image (Pride)<br>Build up tour (Excitement)                        | Eye contact to show interest<br>Explain tour orally<br>Instruct visitors orally<br>Audio visual aids (Movies, slides, recordings, etc.)<br>Gestures as a way of getting attention |

| TASK STATEMENT   | RUN ERRANDS   |   | SAFETY - HAZARD |
|--|---|---|-----------------|
|  | TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE                                     |                 |
| Standard office set-up<br>Local maps<br>Objects involved in performing errand<br>Money<br>Address book | Receive instructions from employee<br>Complete the errand   |   |                 |
|  |   |   |                 |
|  |   |   |                 |
| DECISIONS  | CUES  | ERRORS  |                 |
| Decide best way to perform errand  | Speed required<br>Nature of duty<br>Company policy<br>Employee instructions   | Slow<br>Uncompleted errand<br>Wrong information received  |                 |
| SCIENCE  | MATH - NUMBER SYSTEMS   | COMMUNICATIONS  |                 |
| Inspiring cooperation (Motivation)<br>Praise in completing errand (Self ego)                           | Addition and subtraction of whole numbers<br>[Making change]<br>Multiplication and division with whole numbers<br>[Making change] | Listening to directions<br>Verbally relaying instructions |                 |

**Duty I                  Reproducing Materials on Photocopy Equipment**

- 1    Maintain and operate photocopy equipment**
- 2    Collate reproduced materials**

(TASK STATEMENT) MAINTAIN AND OPERATE PHOTOCOPY EQUIPMENT

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON   | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD   |
|--|---|---|
| DECISIONS  | CUES  | ERRORS  |
| Standard office set-up<br>Photocopy equipment<br>Photocopy supplies<br>Materials to be reproduced<br>Repair address and phone number | Attend photocopy training sessions<br>Attain an acceptable level of performance<br>Keep equipment in running operation<br>Keep adequate supplies on hand<br>Operate equipment<br><br>Implied - application of procedure | Illegible copies<br>Waste<br>Prepare reset-counter correctly<br>Papers jamming<br>Poor intensity setting                            |
| SCIENCE  | MATH - NUMBER SYSTEMS   | COMMUNICATIONS  |
|  | Locate by approximation rational numbers and integers on the number line (Sequential ordering)  | Reading written directions<br>Listening to oral directions<br>Using photocopier manual<br>Giving mechanical instructions to machine |

| (TASK STATEMENT) COLLATE REPRODUCED MATERIALS      |  | PERFORMANCE KNOWLEDGE   |  | SAFETY – HAZARD  |                |
|--|--|---|--|--|----------------|
| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON | <ul style="list-style-type: none"> <li>Standard office set-up</li> <li>Jogger (If available and necessary)</li> <li>Collator (If available)</li> <li>Staple, and staples</li> <li>Binders and binding supplies</li> <li>Punchers</li> <li>Notebooks</li> <li>File folders</li> </ul> | <ul style="list-style-type: none"> <li>Sorts reproduced materials to be collated</li> <li>Organize material for efficient collation</li> <li>Collate material</li> <li>Secure material</li> <li>Distribute material</li> <li>Return original to employee</li> </ul> | <ul style="list-style-type: none"> <li>Paper cuts</li> </ul> | <ul style="list-style-type: none"> <li>Inaccurate collating</li> <li>Improper securing</li> <li>Waste</li> </ul>                                 |                |
| DECISIONS  | Determine method of securing material  | <ul style="list-style-type: none"> <li>Number of pages</li> <li>Methods available</li> </ul>  | CUES   | <ul style="list-style-type: none"> <li>Inaccurate collating</li> <li>Improper securing</li> <li>Waste</li> </ul>                                 | ERRORS         |
| SCIENCE  | Frustration of completing job on time<br>Boredom of job  |   | MATH – NUMBER SYSTEMS  | <ul style="list-style-type: none"> <li>Locate by approximation rational numbers and integers on the number line (Sequential ordering)</li> </ul> | COMMUNICATIONS |
|  |  |   |  | <ul style="list-style-type: none"> <li>Reading and/or listening to instructions</li> <li>Requesting information</li> </ul>                       |                |

Duty J

Machine Transcribing

- 1 Operate transcribing equipment
- 2 Prepare transcribed materials for mailability

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| (TASK STATEMENT) OPERATE TRANSCRIBING EQUIPMENT                  |  | PERFORMANCE KNOWLEDGE  |  | SAFETY - HAZARD                                      |  |
|--|--|--|--|--|--|
| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON               |  | DECISIONS  | CUES   | ERRORS   |  |
| Standard office set-up<br>Transcriber and transcribing materials |  | Read machine manual<br>Learn to operate transcriber efficiently<br>Operate transcriber | Implied application of procedure                 | Inability to operate<br>Erasing material by accident |  |
|  |  |  |  |  |  |
| SCIENCE  | MATH - NUMBER SYSTEMS  |  | COMMUNICATIONS                                   |  |  |
|  |  |  |  |  |  |
|  | Frustration of operator<br>Boredom with job<br>Insecurity with machine |  | Reading transcriber manual<br>Listening to beeps |  |  |
|  |  |  |  |  |  |

(TASK STATEMENT) PREPARE TRANSCRIBED MATERIAL FOR MAILABILITY

| TOOLS, EQUIPMENT, MATERIALS,<br>OBJECTS ACTED UPON  | PERFORMANCE KNOWLEDGE   | SAFETY - HAZARD   |
|---|---|---|
| Standard office set-up<br>Transcribing equipment<br>Standard typing supplies<br>Background material<br>Reference materials - dictionary, zip code directory, grammar book, secretary handbook | Interpret instructions from dictator<br>Use appropriate forms<br>Transcribe<br>Make corrections<br>Revise dictated material<br>Prepare enclosures<br>Return information to dictator<br>Punctuate material<br>Proofread material | <b>DECISIONS</b><br><br><b>CUES</b><br><br><b>ERRORS</b>  |
|   | <b>DECISIONS</b><br><br>Implied - application of procedure  | Messy material<br>Incorrect information<br>Erasing belt by accident<br>Misinterpreting material   |
|   | <b>SCIENCE</b><br><br>Reinforcement of good dictating habits<br>Tactfully suggesting improvement of dictating habits (Ego)<br>Protect insecurity of dictator (Fear).<br>Employee's satisfaction with job                        | <b>COMMUNICATIONS</b><br><br>Reading coded directions from machine index slip<br>Using correct English usage, spelling, and punctuation<br>[Written]<br>Relaying written messages |
|   | <b>MATH - NUMBER SYSTEMS</b>  |   |

## STANDARD OFFICE SUPPLIES

The phrase "Standard Office Set-up" is used under each task listed in the column entitled "Tools, Equipment, Materials and Objects Acted Upon"

The standard office set-up includes:

- Desk
- Chair
- Waiting room
- List of visitors expected
- Telephone, telephone message pad
- Typewriter and supplies
- Pens
- Papers

The phrase "Standard Typing Supplies" is also used quite frequently in the column entitled "Tools, Equipment, Materials and Objects Acted Upon"

The standard typing supplies include:

- Letterheads
- Second sheets
- Inter-office memos
- Envelopes
- Labels
- Carbon paper
- Forms
- Typing eraser
- Correcto-type
- Pencil eraser
- Shield
- Chalk